

# Churn Matrix – Suggestions to Help

<b>New Donors</b>	<b>Same</b>	<b>Growing</b>	<b>Varied Up</b>
<p>Goal – Build relationships with these donors</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Seek ways to build relationships with donors to understand what is important to them (personalize solicitations based on interest, segment donors for better communication)</li> <li>• Provide opportunities to engage donors in their work to the extent of their interest and expertise</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Make personal visits</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Provide a printed recognition directory (distribute national book of leaders)</li> </ul>	<p>Goal – Want donors to increase their gifts</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Provide opportunities to engage donors in their work to the extent of their interest and expertise</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Ask for a specific amount</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Provide a printed recognition directory (distribute national Book of Leaders)</li> <li>• Offer challenge match to encourage donor to step up</li> <li>• Request increased giving based on community impact products</li> <li>• Request multi-year gift commitments</li> </ul>	<p>Goal – Keep these donors in this growing pattern</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Communicate and inform donors on how their gifts were used</li> <li>• Provide opportunities to engage donors in their work to the extent of their interest and expertise</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Provide a printed recognition directory (distribute national Book of Leaders)</li> </ul>	<p>Goal – Want donors to continue increasing their gifts as opposed to varying them</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Communicate and inform donors on how their gifts were used</li> <li>• Provide opportunities to engage donors in their work to the extent of their interest and expertise</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Provide a printed recognition directory (distribute national Book of Leaders)</li> </ul>
<b>Varied Down</b>	<b>Decliners</b>	<b>Current Year Defectors</b>	<b>Defectors</b>
<p>Goal – Want donors to either maintain or increase their gifts as opposed to varying the amount downward</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Seek ways to build relationships with donors to understand what is important to them (personalize solicitations based on interest, segment donors for better communication)</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Make personal visits</li> <li>• Ask for a specific amount</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Develop a loyal contributor program (ask donors to self identify their length of giving)</li> <li>• Provide a printed recognition directory (distribute national Book of Leaders)</li> <li>• Offer challenge match to encourage donor to step up</li> <li>• Request increased giving based on community impact products</li> <li>• Request multi-year gift commitments</li> </ul>	<p>Goal – Want donors to either maintain or increase their gifts</p> <p>Tactics -</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Thank...timely and often</li> <li>• Seek ways to build relationships with donors to understand what is important to them (personalize solicitations based on interest, segment donors for better communication)</li> <li>• Engage donors in year round communication (newsletters, holiday cards, personal notes)</li> <li>• Make personal visits</li> <li>• Ask for a specific amount</li> <li>• Invite donors to all organizational events (provide reserved seating, offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Develop a loyal contributor program (ask donors to self identify their length of giving)</li> <li>• Provide a printed recognition directory (distribute national Book of Leaders)</li> <li>• Offer challenge match to encourage donor to step up</li> <li>• Request increased giving based on community impact products</li> <li>• Request multi-year gift commitments</li> </ul>	<p>Goal – Want to get these donors to give again</p> <p>Tactics –</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Invite donors to all organizational events (offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Develop a loyal contributor program (ask donors to self identify their length of giving)</li> <li>• Develop strategies to continue the relationship once the donor leaves the workplace</li> </ul>	<p>Goal – Want to get these donors to give again</p> <p>Tactics –</p> <ul style="list-style-type: none"> <li>• Maintain accurate and updated donor information</li> <li>• Invite donors to all organizational events (offer agency tours, offer meetings with the President or Board Chair, hold annual thank you reception, etc)</li> <li>• Develop a loyal contributor program (ask donors to self identify their length of giving)</li> <li>• Develop strategies to continue the relationship once the donor leaves the workplace</li> </ul>

Note – The specific tactics suggested above can be used to improve your Churn rate in each of the listed segments. Many of these tactics can and should be used in all categories as good customer service and relationship building tools. The following best practices are imperative regardless of the segment you are focusing on: organizational commitment to a relationship oriented culture, employing a dedicated Major Gifts staff person, recruiting a volunteer champion, and using electronic donor screening for potential (because it's your opportunity to expend your resources on those donors who have the most potential for your organization).